



State of New Jersey

DEPARTMENT OF THE TREASURY

DIVISION OF PURCHASE AND PROPERTY

PURCHASE BUREAU

P.O. Box 230

TRENTON, NEW JERSEY 08625-0230

T-2615

Investment Consulting Firms

Various State Authorities, Agencies, Departments, and Commissions

09-X-20831

Award Summary

November 1, 2009

I. Compliance/Approval Requirements

- All compliance and approval instructions may be found in the Request for Proposal (RFP) Sections 1.3 Engagement Process and 3.0 Scope of Work.

II. Purpose

- The purpose of this contract is to engage an investment consulting firm to provide various services concerning defined contributions programs.
- The scope of work and request for competitive price quotes for each investment consulting contract shall be developed on an individual basis as requested by a using agency.
- The request shall be sent from the using agency to the contractor(s).

III. Award Method

- The State has awarded four (4) contracts:
 - Callan Associates Inc., Florham Park, New Jersey
 - Mercer Investment Consulting, Inc., New York, New York
 - PFM Asset Management, LLC, Philadelphia, Pennsylvania
 - Segal Advisors, New York, New York

IV. Directions for Use of Contract

- The State Contract Manager shall answer any question or concern about any aspect of the contracts.